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Overview

Important notes:

- To be able to use Freebies, create a lookup to **CT Product** from the **Freebie Line Item** object.
- All products that could be granted as freebies should have **Price Book Line Item** records.
- Conditions for giving Freebies do not include bundle components.
- Only Active products can be given as freebies.

A *freebie* is a free-of-charge product that can be added to the order cart as a gift when a customer meets the conditions for receiving freebies for a set of paid products.
Freebies can be granted for products added from Catalogs or Promotions.

> Freebies are added or removed from the cart manually by a sales rep during the order creation process.

Freebie Type Record Types

CT Orders provides two Freebie Types:
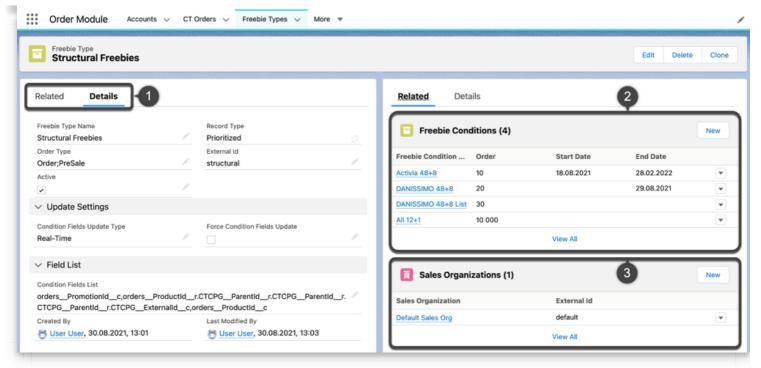
- **Prioritized**.
  If this type is selected, the system applies Freebie Condition records that have the lowest or highest order number among multiple records that match the criteria.
- **Selective**.
  If this type is selected, the system applies all Freebie Condition records that match the criteria.

> Only one selective and one prioritized Freebie Type record can be simultaneously used for one Sales Org. The records do not interact or interfere with each other, the system analyzes and applies conditions for both types at once. It is recommended to avoid linking two records of the same Freebie Type to a Sales Org, as it might lead to incorrect system behavior during freebie calculation.

The Freebie Type window page consists of two main tabs: **General** and **Related (1)**:

:::: Order Module   Accounts ∨   CT Orders ∨   Freebie Types ∨   More ▼

Freebie Type
Structural Freebies   Edit   Delete   Clone

The **General tab** contains the information about the created Freebie type:

- Chosen record type: Prioritized or Selective.
- Name and External Id.
- Order Type.
- Update type for Condition Fields.
- Condition Fields List that includes the API names of all fields that will be used for freebies calculation.

The **Related** tab includes two sections:

- List of the created **Freebie Conditions (2)** to apply during the calculation process.
- List of **Sales Organizations** to which the current Freebie type relates.

Each Freebie Type includes a set of conditions that should be applied to calculate the number of freebies available for each order. Freebies are added to the order cart depending on a principle selected in the **Adding Method** picklist:

- **Similar**. The same product for which the condition is applied will be granted as a freebie.
- **Criteria Based**. Apply if you want to grant a product specified with SOQL filter considering all conditions for the selected Freebie Type (for example, only products of a specified brand).
- **List Based**. Apply when you want to grant a specific product which is selected on the Freebie Line Item record related to a Freebie Condition.

> For the **List Based** method, you can set quantity on a product record, while for other methods you can only set min/max quantity on their respective levels.

Freebies Calculation Process

The calculation process for freebies is similar to the Discount calculation process. The rules which are used for calculation are manifested in the **Freebie Condition** child records and filtered and applied one by one in a distinct order.

1. Create a new order and add a required number of products to your cart.
2. The system checks the mapping on the Object Setting record to determine the object which contains the product **Quantity** field.
3. The system checks if Freebie Type records exist for the Sales Org and specified Order Type.

> The **Freebie Condition** record for the applied **Freebie Type** must have at least one **Freebie Level** record.

4. The system checks that all fields in the **Condition Fields List** field (on the applied **Freebie Type**) are accessible for a current user. If at least one field is not accessible, freebies will not be available for the order.
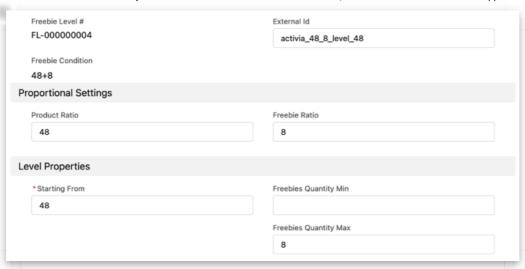
> The **Condition Fields List** field is filled out automatically with the values pulled from the **Condition Details** fields on the **Freebie Condition** child records. The field update is performed in one of two possible ways depending on the option selected in the **Condition Fields Update Type** picklist.

5. After a Freebie Type is successfully processed, the system analyzes each **Freebie Condition** record related to the Freebie Type:
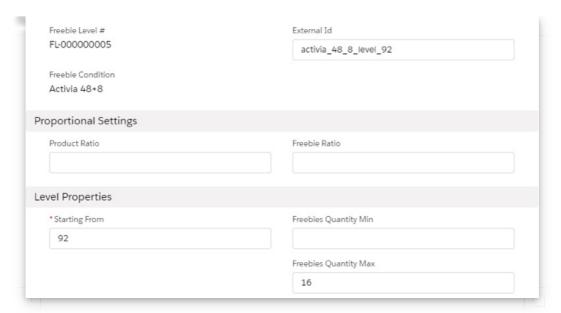
a. The system checks **Freebie Level** and **Freebie Line Item*** (only for the List Based method) records.

b. A list of products granting freebies is compiled from suitable Order Line Items.

c. The **Condition Details** field on the **Freebie Condition** record is parsed.

Condition

Condition Details

```
{ "levelConditions": {
  "operator": "AND",
  "productCount": {
   "filter": {
    "operator": "AND",
    "items": [
     {
      "field": "orders__PromotionId__r.orders__ExternalId__c",
```

If a **Criteria Based** method is selected for this Freebie Condition, the **Criteria Details** field is parsed.

Freebies Settings

* Adding Method

Criteria Based

Proportional ☐

Distribution Criteria

Criteria Details

```
{ "levelConditions": {
  "operator": "AND",
  "productCount": {
   "filter": {
    "operator": "AND",
    "items": [
     {
      "field": "orders__PromotionId__r.orders__ExternalId__c",
```

d. All Freebie Level child records are analyzed. If no Level record is found for a condition, this Freebie Condition will be skipped.

Freebie Level #
FL-000000004

External Id
activia_48_8_level_48

Freebie Condition
48+8

Proportional Settings

Product Ratio
48

Freebie Ratio
8

Level Properties

* Starting From
48

Freebies Quantity Min

Freebies Quantity Max
8

Processing Records with Similar Adding Method For a **Similar** method, freebies quantity is set based on the **Freebies Quantity Min** and **Freebies Quantity Max** field values on a **Freebie Level**. If the **Proportional** checkbox is selected, the **Product Ratio** and **Freebie Ratio** fields are considered in the calculation. Note, that the **Freebie Ratio** field, in this case, defines the maximum number of freebies available for a number of products that are already in your cart. Meanwhile, **Freebies Quantity Max** specifies the number of freebies for the whole level.
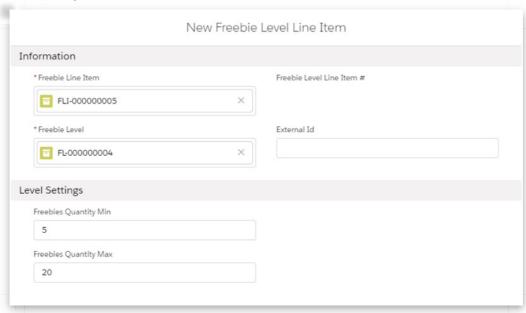
A freebie is granted when the number of paid products in the order cart reaches the value specified in the **Starting From** field. For this method products for each Freebie Level are calculated separately for each paid product that matches the conditions in the **Condition Details** field.

Processing Records with List Based Adding Method

If the **List Based** method is selected, an additional **Freebie Line Item** record should be created for each product you want to grant as a freebie. The product (freebie) is specified in the Product field. On the Freebie Level, you can also define if the freebies should be calculated proportionally or by Max / Min values.
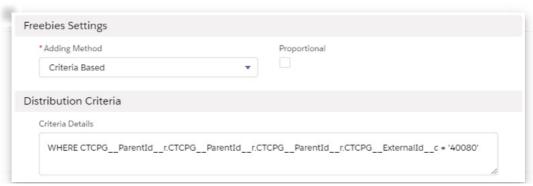The product quantity and proportionality are defined on Freebie Level records the same way as for other methods. You can set a quantity of each freebie for each level by adding **Freebie Level Line Items**:

For this method products for each Freebie Level are calculated per group of products that match the conditions in the **Condition Details** field.

Processing Records with Criteria Based Adding Method

This adding method calculation resembles the **Similar** method, but the list of products that can be granted as freebies is taken from the **Criteria Details** field.

The SOQL request for the **CT Product** object provides a dynamic search among the specified object records and other related objects (with lookups to **CT Product**). The system compiles a list of all products that matched the criteria. For this method products for each **Freebie Level** are calculated per group of products that match the conditions in the **Condition Details** field.
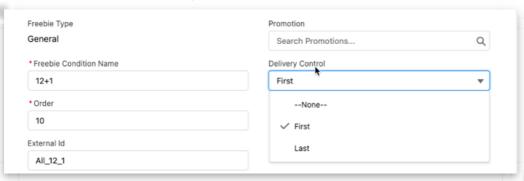
Freebies Distribution

Auto-update

Since CT Orders Major release 2.0 the freebies distribution in orders is almost fully automated. Now you only need to open the freebies window by clicking on the **Get Freebie** button while in the order cart and the system will calculate and distribute the correct amount among available freebies where possible. The following auto-update logic is implemented:
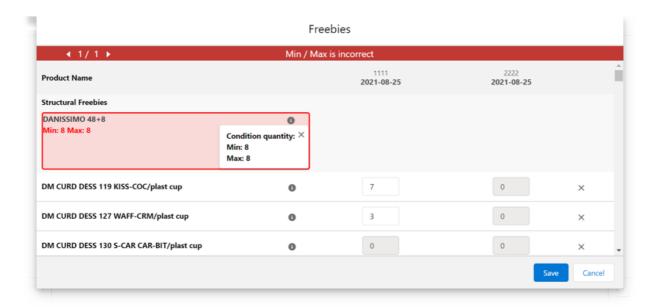
- Fully automated distribution is applied in case when a specific product (**Freebie Line Item**) reaches freebies minimum quantity and/or the proportionality condition is met. For example, a **Freebie Condition** with the following settings:

  - **Adding method**: **Similar**,
  - **Proportional** is active,
  - **Ratio** of Product/Freebie is **12:1**.

- Freebies update after changing products quantity: freebies that no longer fit the order conditions will be automatically removed.
- If the **Delivery Control** is active – automatically distribute freebies to First or Last delivery when deliveries are created or deleted.
  - This option is selected in the **Freebie Condition** setup and defined in the **Freebie Condition**.

- If the **Delivery Control** is inactive – all freebies that can be automatically distributed are added to the first delivery by default. You can distribute List Based and Criteria Based freebies (if more than 2 freebies are available) between deliveries as desired.
- For group freebies (**List Based** or **Criteria Based**) when more than one product matches the condition criteria, you need to manually distribute available freebies amount in the delivery (or deliveries, if Delivery Control is off). When the maximum for the group is reached, all empty cells are locked out. If you enter more than allowed by the **Freebie Quantity Max** field on the Freebie Condition Level, the error will display and you'll need to manually fix the number of distributed freebies.

The order cannot be finalized if freebies in order are not relevant. Freebies recalculation and update is performed only when you open the Freebies windows by clicking **Get Freebies** in the order cart. Then, click **Save** to apply distribution changes.

Multiplier

Freebies can also be added to the order cart in **multiples** if a Freebie Multiplier is toggled on. The added amount is based on the specified quantity and set at the **Product** object (defined by the **Object Settings** record type on the **OM Settings**).

This option applies only to the freebies addition. Paid products have a separate multiplicity logic.

The freebies multiplier logic goes by these steps:

a. The system checks the value (on/off) in the created **Is Use Freebie Multiplier** field on the **Product object**.
   This value will define whether the logic will proceed or end with the multiplicity set to 1;

b. Next checked the value in the **Unit In Package** field:

   ○ if the field is empty or its value is 0 then the option won't be applied and the freebies will be added with a multiplicity of 1;

   ○ if the field's value is other than 0 then the amount in the **Quantity** field on the **Order Line Number** will be a multiple of a number specified in the **Unit In Package** field.

The multiplicity works only for the product per one delivery, not across all deliveries of this product within the order.
If the option is on, the automatically added amount of freebies will be rounded to a **multiple** value if the conditions for multiplicity are met.